

Compeat Help

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Create Order Templates

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If you find yourself spending hours a week creating the same orders for your vendors, consider using order templates.

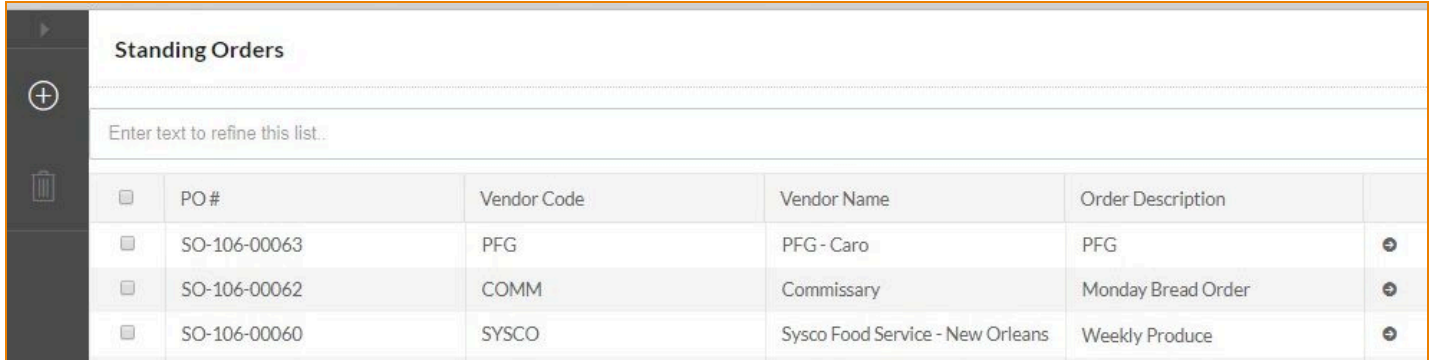
You can add your usual items, then have Compeat quickly generate the order when needed. All you need to do is confirm items, enter quantities, and send!

Why create order templates?

- » Save time when creating a purchase order by loading a template and entering desired item quantities.
- » Flexibility to create a purchase order using a template and still add or remove items as needed.

- » Quickly pre-fill template with items recently purchased from the vendor.
- » Perfect for seasonal, special event, or regularly placed orders.

You can access order templates by navigating to **Orders > Standing Orders**.

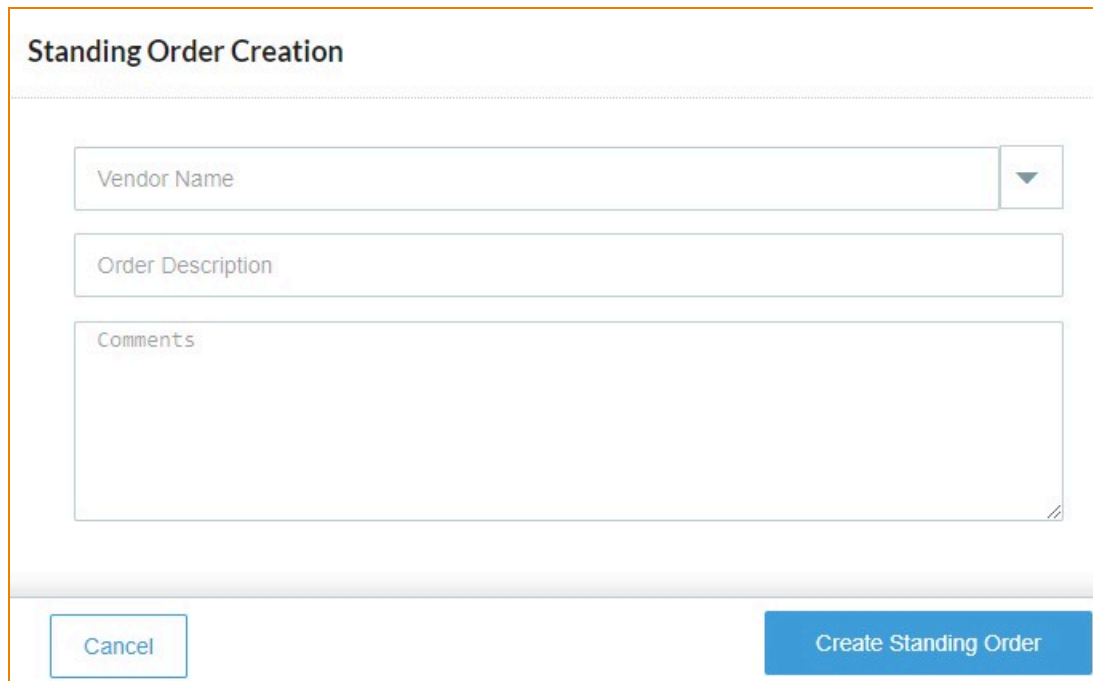


<input type="checkbox"/>	PO #	Vendor Code	Vendor Name	Order Description	
<input type="checkbox"/>	SO-106-00063	PFG	PFG - Caro	PFG	⊕
<input type="checkbox"/>	SO-106-00062	COMM	Commissary	Monday Bread Order	⊕
<input type="checkbox"/>	SO-106-00060	SYSCO	Sysco Food Service - New Orleans	Weekly Produce	⊕

- » **Need to create a new order template?** Select the plus sign icon on the left side of the page.
- » **Want to edit an existing order template?** Simply select the order details to view and edit the order.

Create a Template

Your first step is to enter order details. These details populate the order header both in the template and in the purchase order you create from the template.



Standing Order Creation

Vendor Name

Order Description

Comments

- » Use **Order Description** to enter identifying information for the template. This helps your team choose the correct template when creating a purchase order.
- » You can still edit information entered in the **Comments** field when you create a purchase order using the template!

Enter Order Items

Enter items for your standing order just as you would a traditional purchase order. Use the plus sign and trashcan icons on the left side of the page to add and remove items.

What about quantities? You can enter quantities if you'd like or leave the cells blank. Users who create an order using the template can then enter the desired quantities at that time.

The screenshot shows the Sysco Food Service - New Orleans interface. At the top, there is a 'Save' button and a 'Copy Standing Order' button. Below that is a 'Document Info' section with a search bar and a 'Columns' button. The main part of the interface is a table with the following columns: Item Description, Item #, Qty, Purchase Unit, Amt Each, Ext Price, and Inventory Level 1. The table contains several rows of items, including BAR SUPPLIES, BEER, and FOOD items.

Item Description	Item #	Qty	Purchase Unit	Amt Each	Ext Price	Inventory Level 1
BAR SUPPLIES Angostura Bittery	700296	0.00	Bottle = 4/mL	\$0.00	\$0.00	BAR SUPPLIES
BAR SUPPLIES Lid Plast 8/12 oz	700215	0.00	CS = 10/100 packs	\$5.80	\$0.00	BAR SUPPLIES
BAR SUPPLIES Luxardo Cherries	700583	0.00	Can = 12/lb	\$0.00	\$0.00	BAR SUPPLIES
BEER Corona Light	34	0.00	CS = 24/Each	\$0.00	\$0.00	BEER
BEER Tecate	11	0.00	CS = 12/Each	\$0.00	\$0.00	BEER
Cheese	12345739	0.00	Can = 1/cup	\$0.00	\$0.00	FOOD
FOOD Beans, Black	85	0.00	Bag = 30/lb	\$0.00	\$0.00	FOOD
FOOD Beans, Black	85	0.00	Bag = 25/lb	\$0.00	\$0.00	FOOD
FOOD Chile de Arbol	4	0.00	Case = 10/lb	\$0.00	\$0.00	FOOD
FOOD Cilantro	14	0.00	Case = 30/Each	\$0.00	\$0.00	FOOD

- » **Want to automatically load previously purchased items?** Compeat can populate a template with items you recently purchased from the vendor. From there, you can add new items or delete items you don't wish to include in the template.
- » **Need to enable pre-fill?** You can enable (or disable) the pre-fill setting on the *Miscellaneous* tab of the vendor record. If you have pre-fill disabled, you can still have Compeat populate previously purchased items. Simply select the pre-fill/list icon on the left side of the page.

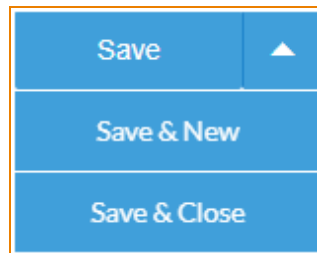
! Before Your Pre-Fill

Selecting the pre-fill icon will clear any items you've already added to your order template. Compeat requires you confirm this action before continuing with the pre-fill request.

- » **Want to copy the template to another entity?** Quickly copy the order details and items to another entity by selecting *Copy Standing Order* at the top of the page and selecting the destination entity from the drop-down.
- » **Prefer your items in a specific order?** You can adjust the order of items to match invoices, positions, or operational preference by selecting items and using the arrows on the left side of the page. Options include moving item(s) up/down one row and moving item(s) to the top/bottom of the listing.

Save Your Template

Select **Save** or select the drop-down arrow to its right to access additional save options:



- » **Save & New:** Saves current template and takes you to a blank order template details page.
- » **Save & Close:** Saves current template and directs you to the main Compeat Inventory page.

Use a Template in Purchase Orders

When you create a purchase order, Compeat gives you two options: use an order template or create an order from scratch.

Selecting *Use Standing Order* presents you with a list of all available templates for your current entity.

Available Standing Orders

Search standing orders

▼ Vendor Name	▼ Vendor Code	▼ SO #	▼ Order Description
<input type="radio"/> Sysco Food Service - New Orleans	SYSCO	SO-101-02890	Thursday Protein Order
<input checked="" type="radio"/> Sysco Food Service - New Orleans	SYSCO	SO-101-02604	Monday Produce Order
<input type="radio"/> PFG - Caro	PFG	SO-101-03018	Monday Bread Order
<input type="radio"/> PFG - Caro	PFG	SO-101-03017	Weekly Produce Order
<input type="radio"/> PFG - Caro	PFG	SO-101-03015	Weekly Produce Order

Select the template you wish to use, and then select **Next**. Confirm your order details then proceed with managing items and entering quantities.

Note that any changes made to the order created from a template do not affect the actual template. You can only edit the template from the Standing Orders feature.

Updated on March 9, 2021

Tagged: efficiency templates

